

Request for Proposals to Provide Regional Operator Services for the Central Indiana Regional Workforce Board RFP-5-09-RO

Release RFP
February 16, 2009

Bidder's Conference & Letter of Intent to Bid Deadline
February 20, 2009

Bidder Questions Deadline
February 27, 2009

Proposal Submission Deadline
March 13, 2009 4:00 PM

Selection of Finalists
March 27, 2009

Best and Final Offers Deadline
March 30, 2009 – April 3, 2009

Selection of Provider
April 3, 2009

Contract Effective Date
July 1, 2009 (planned)

**Indiana Region 5 Workforce Board, Inc.
C/O Douglas Jones
3815 River Crossing Parkway, Suite 300
Post Office Box 40977
Indianapolis, IN 46240-0977
Tel. (317) 208-2476**

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Part I - Background

The Region 5 Workforce Board, Inc. d.b.a. Central Indiana Regional Workforce Board (RWB) is a registered 501(c)(3) not-for-profit corporation which has oversight of employment and training programs in the following eight counties: Boone, Hamilton, Hancock, Hendricks, Johnson, Madison, Morgan, and Shelby counties. The RWB serves as a pass through entity providing employment and training programs in the Economic Growth Region 5 (Region 5), excluding Marion County, using a variety of state and federal grant resources, including those available through the Workforce Investment Act (WIA), and several other grants.

The RWB is governed by a 14 member volunteer board that will initiate program directives and provide oversight and guidance on program operations. The Regional Operator (RO) shall serve as the administrative arm of the RWB. RO staff attends all board meetings, presenting performance data, any administrative concerns and new programs that fit into the RWB's strategic planning. The RO attends all state directed meetings. No Regional Operator staff person shall be a member of the RWB. Crowe Horwath LLP serves as Fiscal Agent with full time staff and records located in Indianapolis and South Bend, Indiana.

The RWB is requesting proposals to secure regional operator agent services for the RWB of Region 5. The successful bidder will enter into negotiations for a two year contract with an optional one year extension at the discretion of the RWB.

Intent to Bid

A formal letter of intent to bid is required from each bidder (see instructions on page 5).

Funding

The funding for these services will primarily come from Federal Workforce Investment Act, Title I funds awarded to the Region. Attachment A shows Program Year 2008 WIA funding levels for the current eleven regions of Indiana (\$3,769,866 allocated to Region 5). While funding can fluctuate, Attachment A provides a reasonable guideline for expected funding levels.

Contract Negotiations

Successful respondent to this RFP will be expected to participate in contract negotiations to establish the exact services to be provided and the payment terms for those services. Costs and services will be negotiated based on information contained in this RFP and in the proposal(s) selected for contract negotiations. All regional operators are considered grant sub-recipients and will serve on a cost reimbursement basis.

Disclosure

Respondents to this RFP should note that the contents of their response to this RFP or other information submitted to the RWB are subject to public release upon request, except those items specifically exempt from disclosure by law or regulation after the selection of the winning bidder. All such proprietary or confidential material should be so marked.

Subcontracts

Bidders may subcontract for all or part of the services to be provided by Regional Operator, but the intentions to subcontract must clearly be stated in the response to this RFP and approved by the RWB.

Administrative Offices

The successful bidder will be required to maintain administrative offices within the Region.

Proposal Format

Proposals must be prepared and sequenced in accordance with the instructions outlined in Part IV of this Request for Proposal. All referenced attachments are included in this packet.

Part II - Procurement Timeline

RFP Release	Monday, February 16, 2009
Bidder's Conference & Letter of Intent to Bid	Friday, February 20, 2009
Q&A Deadline	Friday, February 27, 2009
Proposal Submission	Friday, March 13, 2009
Finalists Selection	Friday, March 27, 2009
Interviews	Monday, March 30 – Friday, April 3, 2009
Proposal Selection (Planned)	Friday, April 3, 2009
Contract Start (Planned)	Wednesday, July 1, 2009

All times shown are in Eastern Standard Time (EST). The RWB reserves the right to adjust the schedule when it is in the best interest of the RWB or to extend any published deadline in this RFP upon notification to those who have requested an RFP.

Any entity wishing to make a proposal for Regional Operator in Region 5 is invited to attend a Bidder's Conference. The Bidder's Conference will be held on Friday February 20, 2009 from 2:00PM to 4:00PM (EST) at the following location:

Indiana Department of Workforce Development
Indiana Government Center
10 North Senate Avenue
Room 301A
Indianapolis, IN 46204

Prior to the Bidder's Conference, questions may be faxed or e-mailed regarding the RFP or proposal process to the Board's Contact. After the Bidder's Conference, questions may be faxed or e-mailed regarding the RFP or proposal process to the Board's Contact. No phone calls will be accepted. No questions will be accepted after 4:00 PM (EST) on Friday February 27, 2009.

Answers to any questions will be sent out to entities who have submitted a letter of intent. This will be done on an ongoing basis, within three (3) business days after receipt of the questions. Therefore, bidders are encouraged to check e-mail frequently to ensure they are fully aware of the most current information. All answers issued in response to the bidder questions become part of the RFP and the RFP process.

It is mandatory that a Letter of Intent to Bid be received by the Board Contact at the address listed below on or before 4:00 PM . Said letter does not commit bidder to submit a proposal.

The Letter of Intent should contain the company name, address, contact person, and contact information. The Letter of Intent can also be e-mailed to the Board Contact. All of the Letters of Intent to Bid will be kept confidential and will be released upon written request and only after a selection has been made for the Regional Operator.

Letters of Intent to Bid are to be addressed to the Board Contact:

Indiana Region 5 Workforce Board, Inc. Fiscal Agent
c/o Douglas Jones
3815 River Crossing Parkway, Suite 300
Post Office Box 40977
Indianapolis, IN 46240-0977
doug.jones@crowehorwath.com
Fax: (317) 706-2660

Other than as specified above, all members of the Central Indiana Regional Workforce Board, Board staff, authorized representatives, or agents of the Board are precluded from entertaining or responding to questions concerning this RFP or the procurement process.

Potential Bidders are prohibited from making any contact related to this RFP with Board staff or the Board of Directors at any time during this procurement. Violations of this prohibition will result in the automatic disqualification of the offending Bidder.

The Central Indiana Regional Workforce Board reserves the right to reject any and all proposals it receives in response to this RFP. It is understood that submitted proposals will become part of RWB's official files without further obligation. The RWB will not pay for the development or preparation of proposals.

Part III - Eligibility and Contract Information

1. Eligible Applicants

Eligible applicants for the Regional Operator include:

- Private or public not-for-profit organizations, including faith-based or community-based organizations.
- Private or public for-profit organizations or entities.

The Regional Operator **MAY NOT** serve as service provider to any other regional workforce board or Workforce Investment Board in the State while serving as Regional Operator to the Central Indiana Regional Workforce Board.

2. Contract Information

Funding for all activities under this RFP will be provided by the appropriate program grant. The actual amount of the contract award will be based on a negotiated cost proposal and available funds and will ensure optimum utilization of funding for services. If a new Regional Operator is selected, the Board may negotiate an interim contract for transitional activities prior to July 1, 2009.

3. Period of Performance

The period of the contract will be effective no later than July 1, 2009 through June 30, 2011. A one year extension may be granted by the Regional Workforce Board

Part IV - Proposal and Submission Information

1. Availability of RFP Packets

Request for Proposal packets will be available beginning on and after 4:00 PM EST Monday, February 16, 2009 at the Board's contact, 3815 River Crossing Parkway, Suite 300, Post Office Box 40977, Indianapolis, IN 46240-0977. Packets may be picked up in person or requested in writing to the above address. The RFP will also be available for download in PDF format from the Indiana Department of Workforce Development's website at <http://www.in.gov/dwd/3067.htm>.

2. Bidder's Conference

A Bidder's Conference will be held for this request on Friday, February 20, 2009 at 2:00 PM EST at the Department of Workforce Development.

3. Questions and Answers

To be considered for funding, each bidder must submit an offer (proposal) and other supporting documentation in strict accordance with these instructions. When evaluating a proposal, the Board will consider how well the bidder complied with these instructions and provided the information outlined in the Request for Proposal. Therefore, the Board encourages bidders to contact the Board Contact by facsimile transmission, email, or regular mail during the **technical assistance period ending Friday, February 27, 2009 at 4:00 PM EST**, to request any additional clarification that may be needed to comply with these instructions. **Phone calls will not be accepted.**

4. Proposal Submission Information

Responses to this RFP should be economically prepared, with emphasis on completeness and clarity of content. The proposal, as well as any reference materials presented, must be typed in English in at least 11 point font and must be written on standard 8 1/2" by 11" paper with no less than one inch margins (although foldouts containing charts, spreadsheets, and oversize exhibits are permissible.) The proposal must be no longer than 30 pages, not counting the exhibits.

Starting after the cover page and the table of contents, number each page at the bottom center using the format "page x of x". The completed attachments B, C, and D and Budget Estimate Worksheet from this RFP must be included with your proposal. The cover page, table of contents and these required attachments do not count as part of the maximum 30 pages.

The Proposal should contain the RFP number, name and address of bidder, and primary contact information. Bidders are encouraged to clearly identify "Proprietary" information as such. All proposal pages must be sequentially numbered and either stapled or bound together.

All information in the proposal should be relevant to a specific requirement detailed in the RFP. Any information not meeting this guideline will be deemed extraneous and will in no way contribute to the evaluation process.

When completed, proposals are to be assembled in the following manner:

- Proposal Cover Page (Attachment B)
- Table of Contents
- Organizational Section –
 1. Organization name
 2. Organization address
 3. Organization telephone number(s)
 4. Contact person
 5. Length of time in business
 6. Chief Executive Officer
 7. A Statement indicating the intent of the organization to provide services described in this RFP
 8. Legal status of the Bidding Entity
 9. Mission or purpose of the Organization
 10. Organization's website address
- Bidders Background & Experience
 1. Description of the purpose of the Organization
 2. Description of the management and structure of the Organization
 3. A listing of similar services provided – Names and Contacts (minimum 5, if applicable) and listing of success in meeting goals
 4. Provide examples (if applicable) of ability to bring in additional resources
 5. Resumes for key personnel that will provide the services –key staff should be named. If key positions are not currently filled bidder should present the positions description, required qualifications and the bidder's plan for recruiting and retaining qualified staff.
 6. Copies of monitoring reports and audit reports for the past two years for similar services

7. Description of any pending or threatened litigation that may impact the bidder's ability to effectively serve the region or meet the RWB's expectations.
- Plan of Service
 1. Detail the plan for providing Regional Operator services.
 2. Services provided on site versus off-site – provide details.
 3. Services provided not specifically required in the RFP.
 4. Regional Operator staff availability – (full time versus part time – provide details).
 - Budget/Cost – Bids will be evaluated based on respondents' proposals to the RFP. Bidders must use the attached Budget Estimate Worksheet (Attachment E) to identify proposed costs.
 - Non-Collusion Affidavit (Attachment C)
 - Assurances and Certifications (Attachment D)
 - Required Insurances/Bonding: General Liability, Workers Compensation, Employee Fidelity Bonding
 - Exhibits
 1. Budget Narrative and Budget Estimate Worksheet
 2. Bidder's Annual Report/Financial Statement
 3. Resumes of the Key Staff to be involved
 4. Organizational Charts
 5. Recent Audits and Monitoring Reports from Similar Initiatives for the past five years

Each section and exhibit must be clearly labeled.

Submittals must include one (1) original, five (5) copies, and one (1) electronic version (either PDF or Microsoft Word format). The electronic version may be provided on a CD or e-mailed directly to the Board's Contact. The original must clearly be marked "**ORIGINAL**" on the cover sheet and contain original signatures, where applicable. No faxed or e-mail copies will be accepted. The original must have original signatures in (blue ink).

All responses become the property of the Board.

6. Submission Dates and Times

The closing date for receipt of proposals under this request is **Friday, March 13, 2009**. Proposals must be received at the address below no later than 4:00 PM EST. Proposals sent by e-mail, telegram, or facsimile (fax) will not be honored. No exceptions to the mailing and delivery requirements set forth in this request will be granted. It is the responsibility of the bidders to ensure delivery of the proposal by the required time and date.

Proposals are to be addressed to:

Indiana Region 5 Workforce Board, Inc. Fiscal Agent c/o Douglas Jones 3815 River Crossing Parkway, Suite 300 Post Office Box 40977 Indianapolis, IN 46240-0977 doug.jones@crowehorwath.com

Any proposal not following these guidelines, or submitted after the deadline will not be accepted for consideration under this RFP.

7. Other Submission Requirements

Withdrawal of Proposals. Proposals may be withdrawn by written notice, including letter, facsimile, or email received by the Board Contact at any time before an award is made. Proposals may be withdrawn in person by the applicant or by an authorized representative thereof, if the representative signs a receipt for the proposal.

Changes, Amendments, and/or Re-Issuance of this Proposal. Unless specifically requested by the Board, changes and/or amendments to the originally submitted proposal will not be considered. In addition, the Board reserves the right to: (1) Amend or withdraw this RFP at any time; (2) Reject any and all proposals; and (3) Re-issue this RFP.

Assurances and Certifications. The individual having Contract Signature Authority must sign the Assurances and Certification Document. **Note:** Do not re-type this document; use the copy provided with this RFP. **(Attachment D).**

Part V - Scope of Services

The Indiana Region 5 Workforce Board, Inc. (RWB) for Region 5 is publishing this Request for Proposal (RFP) to seek responses for a Regional Operator in Region 5 which consists of the following counties: Boone, Hamilton, Hancock, Hendricks, Johnson, Madison, Morgan, and Shelby counties. The selected respondent from among the proposals will be a contractor for the Region 5 RWB.

- Indiana has been divided into eleven Regional Workforce Service areas. Each area has a RWB that will be responsible for the delivery of workforce services in that geographic region.

- The State Fiscal Agent, Crowe Horwath LLP, provides comprehensive financial management, accounting, reporting and sub-recipient monitoring services for the Indiana Region 5 Workforce Board.
- The Regional Operator will provide support services for the RWB and will provide operational oversight and management for the WorkOne offices in the region.
- Additional details on this structure are contained in Indiana's Strategic Two-Year Plan for the Workforce Investment Act and Wagner-Peyser Act. This document can be found at http://www.in.gov/dwd/files/stateplan_120805.pdf.

Regional Operator responsibilities include:

1. *Responsible for leading and managing the delivery of an integrated client services system* in accordance with federal and state legislation and regulations, state policy, and the Indiana Strategic State Plan. Programs include, but are not limited to the following:
 - Workforce Investment Act Title I Adult,
 - Dislocated Worker,
 - Youth,
 - Wagner- Peyser Act,
 - Veterans employment and training programs,
 - Trade Adjustment Assistance.
 - Other programs as determined by the RWB, State Workforce Investment Council, the state, or federal government.
 - Establish a professional and effective working relationship with State officials, funders, oversight entities, sub-contractors, and state and local elected officials.
 - Ensure adherence of the system to state policies. Policies of the Indiana Department of Workforce Development may be found at <http://www.in.gov/dwd/2880.htm>.
 - Ensure adherence to the Regional Integration Policy as outlined in DWD Policy 2007-20, http://www.in.gov/dwd/files/2007_20.pdf.)
 - Procure all service providers in accordance with state and federal regulations to operate the Region's WorkOnes.
2. *Direct and coordinate the flow and delivery of services in each WorkOne Center* located in the region.
 - Direct and coordinate the flow and delivery of services in each WorkOne located in the region in accordance with the State's Regional Integration Policy and mutually agreed to service level standards. While the Regional Operator directs the flow and functionally supervises the staff, staff of the Regional Operator entity may ***NOT provide WIA Title 1 core, intensive or training services or other direct workforce services*** in Region 5 or in any other region in the State, as provided in Indiana Code.

- Provide technical assistance to the workforce service providers in the WorkOne system, including the non-procured partners in the one-stop system.
 - Create a budget, cost allocation plan, and procurement policy for the RWB 's approval, including budgeting for the work of the RWB.
 - Ensure compliance with the region's procurement policy, including execution of all contracts.
 - Provide participant reporting and data validation functions, in conjunction with the RWB.
 - Coordinate / Cooperate with the state selected Fiscal Agent concerning fiscal and financial reporting formats and processes.
3. *Seek additional funding sources and partnering opportunities* that will enhance the region's ability to provide workforce development services. Staff will be expected to go beyond basic one-stop system oversight and continually look for ways to strategically grow jobs, employment and personal income in Region 5. Staff must be able to form coalitions and partnerships to achieve these results. Obtain additional funding by utilizing the existing and available resources of regional grant writers.
- Conduct research, analysis and strategic planning (or contract for same) to develop a community audit with annual updates and publication of a State of the Workforce report. To share the information with the public and gain insights for strategic planning, the Regional Operator will be expected to organize an annual Community Workforce Summit to inform the broadest segment of the regional community of the issues, challenges, and accomplishments of workforce development, economic development, and education. Strategies resulting from the research and summit and subsequent board planning are to be included in the region's strategic plan of workforce investment, developed by the Regional Operator.
4. *Promote the efforts of the WorkOne System and the Boards initiatives.* The RWB is an active, business-led, volunteer board that establishes policy and drives the region's strategy for workforce development. Regional Operator staff must provide proactive support to this board. Staff providing direct support functions to the RWB must be approved by the RWB, and cannot be changed by the Regional Operator without the RWB's prior approval. The purpose and role of Regional Operator staff is to:
- Assist the RWB to think strategically regarding the development of a comprehensive workforce system and alignment of the workforce system with economic development and education.
 - Assist the RWB with supplemental marketing and promotion of the WorkOne system
 - Assist the RWB to develop into a dynamic, cooperative, and positive team with the capacity to achieve established goals.

- Cultivate a climate that actively engages Regional Operator staff members as well as RWB members, so that value-added results are seen and individuals sense the benefits of participating.
 - Assist the RWB in developing and using an industry cluster approach to workforce, education, and economic development policy and practice.
 - Identify and use a strategic planning process that will produce both short and long-term goals, and achievements resulting in visible actionable plans.
 - Ensure that the RWB meets its responsibilities with respect to contracts in force (e.g. Business Consultant contract).
 - Provide data-based performance reports to the RWB on a regular basis.
 - Compile and publish data-based performance indicators in graphic form on a regular basis.
 - Liaison with the Local Elected Officials within the Region on matters relevant to the Board.
 - Perform other related duties as determined by the Regional Workforce Board.
- Implement solutions to skill shortages identified through the state's strategic skills initiative. Full information about the initiative may be found at <http://www.in.gov/dwd/3175.htm>.
 - Update and maintain the eligible training provider data including, but not limited to the acceptance of applications from training providers, the entry of applications into the state system and the first level approval or denial of such applications. Such actions will be in coordination with the regional workforce board and the State workforce board. The state's eligible training provider policy may be found at <http://www.in.gov/dwd/files/1998-65-wiawtw.pdf>
 - Develop RFP's for service providers and all other contractors in coordination with the Fiscal Agent and oversee the evaluation and selection process with the approval of the RWB.
 - Perform duties identified for the One-Stop Operator in federal and state legislation, regulations, policies and procedures.
 - Receive, along with the RWB, technical assistance and support from the Indiana Department of Workforce Development.

Part VI. Selection Process

Procurement will be conducted in a manner that provides for full and open competition. Award will be made only to individual(s) or organization(s) possessing the qualifications and demonstrated ability to perform successfully under the terms and conditions of a contract and that is in line with the scope of services listed in this RFP.

The selection process will consist of:

- a. An initial review for responsiveness and compliance with the technical specifications and other criteria specified in the RFP;
- b. Only *responsive* proposals will be evaluated and scored by a proposal evaluation team. Responsive proposals will be evaluated on specific areas by all reviewers using the same standardized instrument;
- c. Proposals will be deemed non-responsive for:
 - 1) Failure to follow the prescribed format for submitting the proposal.
- d. Review and scoring by evaluators (see Part VII below for details);
- e. Oral discussions of proposals with bidders as needed;
- f. On-site interviews and/or request for additional information with top selected bidder(s) (price will be considered and discussed with bidders in this or the previous step);
- g. Presentation of evaluations, scoring and recommendations of proposal review team to the Board;
- h. Discussion and appropriate action by the Board in selecting proposed contractor(s) for contract negotiations.
- i. Successful bidders may be subject to an on site visit to evaluate administrative and financial management systems. Additionally, they may be required to attend a contractor training session to ensure they are cognizant of Operator responsibilities, reporting requirements, payment methods and performance measures to ensure successful contract performance.

Part VII - Evaluation Process and Rating Criteria

There are 100 points available under this RFP.

The Board may, at its sole discretion, waive minor errors or omissions in a Technical Proposal and/or a Cost Proposal when those errors do not unreasonable obscure the meaning of the content. Further, the Board reserves the right to request clarifications from bidder of any information in their proposals/forms, and may request such clarification as it deems necessary at any point in the proposal evaluation process.

Rating Criteria

The applicants' bids will be evaluated on 5 criteria each carrying a unique weighting:

- | | Possible points |
|---------------------------|-----------------|
| • Sub Contractor Planning | 10 |

- | | |
|--|----|
| • Coordination Planning | 10 |
| • Program Management & Organizational Capacity | 30 |
| • Outcomes / Results Delivered | 30 |
| • Comprehensive Review/Cost | 20 |

Sub Contract Planning (10 Points)

The Regional Operator will be an instrumental component for the management of workforce services in the Regional WorkOne system and provide staff functions for the Regional Workforce Board.

- The integration of services and workflow for the WorkOne system are an integral part of Indiana's workforce system. Describe how a plan to fully integrate services for seamless service delivery will be developed. Currently all counties have a full service WorkOne or WorkOne Express. Describe how functional supervision, staff training, employer and employee input, customer satisfaction surveys, etc. will be solicited and used. Include a plan describing the design of the customer flow of traffic, staff training, coordination of partner services, general room layout, and provide a timeline for implementation. Include in this plan how a continued presence in all counties would be maintained.
- The applicant will describe their ability to coordinate with workforce development, education development, and economic development organizations.
- The applicant will describe their capabilities to provide staff to the RWB similar to supportive functions provided to Workforce Investment Boards as described in WIA legislation. Include a plan indicating, at a minimum, where the staff support to the RWB would be located within the region (use of WorkOne or WorkOne Express is acceptable).

Scoring on this criterion will be based on the following:

- How service integration and customer satisfaction are addressed.
- How the flow of services is designed.
- How coordination with workforce development, education development, and economic development organizations will be achieved
- The comprehensiveness and quality of RWB staffing functions to be provided.

Coordination Planning (10 points)

The Regional Operator will be directing and coordinating the delivery of workforce services in the WorkOne Centers and Express sites located in the region. In accordance with the State's Regional Integration Policy, the Regional Operator will integrate Wagner-Peyser, Workforce Investment Act, Veterans, and Trade Adjustment Services in the WorkOne Center and Express Offices. Additionally, the Regional Operator will also coordinate with the Partner Services available in the regional offices to ensure customers have access to the full array of services.

The applicant will:

- Describe how the Regional Operator envisions his/her role with the RWB, including how coordination will occur.
- Describe how the Regional Operator will assist the RWB to assume a stronger leadership role over the next two program years. Include the relationship between the Regional Operator, RWB, and the State. Describe how capacity building for the RWB will be provided.
- Describe the Regional Operator's role with workforce development, education development and economic development organizations.

Scoring of this criterion will be based on the following:

- How coordination with workforce development, education development, and economic development organizations will be achieved
- How coordinating with the RWB will occur, including how the leadership role of the RWB will be enhanced over the next two program years.

Program Management & Organizational Capacity (30 points)

Applicants must demonstrate the capacity and capability of the applying entity to be a Regional Operator. The Region 5 Workforce Board, Inc. for Region 5 is interested in learning the organization's capacity to administer workforce development programs and program management capability.

The applicant will:

- Describe the entity's ability, organizational capacity, and track record to administer workforce development, education development, and economic development services in the regional area. Identify a Regional Operator Director with whom the State and RWB will communicate. Provide the qualifications of the Director and other key staff members.
- Describe credentials and certifications for personnel related to the delivery of workforce or related services.
- Describe the entity's procedures to monitor and ensure compliance with participant data entry requirements. The Regional Operator is responsible for reporting of activity and progress toward achievement of outcomes. Describe how data validation will occur.
- Describe how the workforce development system will be managed to meet performance, expenditure levels and enrollments.
- Describe how key program outcomes will be measured and reported to interested stakeholders. (RO may list key measures that will be tracked in order to achieve planned outcomes.)

- Provide a copy of the most recent audit report done for the Regional Operator's organization/entity indicating its ability to administer workforce development, education development, and economic development services.
- Describe the Regional Operator's experience with accounting reporting systems specifically with Department of Workforce Development (DWD) and other state/federal agencies and/or private sector entities.

Scoring of this criterion will be based on the following:

- Appropriate staff/organizational credentials, experience and track record of outcome achievement
- The applicant's ability and capacity to administer workforce development, education development, and economic development services as the Regional Operator, including key staff qualifications.
- The applicant's experience and ability to monitor and ensure compliance with participant and financial data entries into the automated reporting system.
- The applicant's demonstrated ability to evaluate performance and measure program outcomes.
- The most recent reviews of performance outcomes for the past 3 to 5 years, if applicable.
- Examples of corrective action plans demonstrating the ability to make course corrections to solve problems and/or improve performance.
- The most recent audit report reflecting the applicant's ability to administer workforce development, education development, and economic development services.

Outcomes/Results Delivered (20 Points)

The organization's success in administering workforce development programs can, many times, be reflected through the outcomes achieved in the region. The RWB is interested in learning about the achievements of the organization/entity or management team. Such achievements may have been measured through contract payment points, achieving benchmarks, achieving or exceeding performance standards, and/or other methods.

The applicant will:

- Provide the outcomes achieved by the applicant. Workforce Investment Act outcomes are preferred but outcomes from other funding sources are acceptable for workforce development, education development, or economic development.
- Provide an example of the applicant's advice and recommendations to an RWB that resulted in proactive actions that prevented a potential failure to achieve outcomes
- Describe corrective actions taken (either internal actions or actions required by a contracting entity) as a result of not achieving outcomes.

Scoring of this criterion will be based upon the following:

- The applicant's ability to meet and exceed planned outcomes.
- The most recent review of performance outcomes
- Results of corrective action plans (if needed).

Comprehensive Review and Cost (20 Points)

Identify workforce development, education development, and economic development needs that have not been addressed. Describe data that supports those needs. Discuss analysis of needs and trends that support your proposal. Identify potential or planned leverage of additional resources and funding.

Identify cost to deliver service. Bidders must use the attached Budget Estimate Worksheet and Narrative (Attachment E) to identify proposed costs. Scoring of the Budget will be based on reasonableness of budget consistent with the scope of work proposed and the thoroughness and logic of the budget narrative. If the organization is applying as a lead organization but proposing to subcontract part of the work, indicate the budget amount for the subcontractor under the "Contract" line item.

Identify creative and innovative solutions you would employ to address the identified needs and trends. Explain how you would relate this analysis to your service provision plan.

Scoring for this criterion will be based upon the following:

- Identification of broad-based workforce development, education development, and economic development needs and trends.
- Creative/innovative proposals to address identified needs.
- Correlation of creative/innovative plans to service provision and outcomes
- Planned leverage of available funding

Part VIII – Award Administrative Information

1. Administrative Program Requirements

All contractors will be subject to all applicable Federal and State laws (including provisions in appropriations law), regulations, and the applicable Office of Management and Budget (OMB) Circulars. The applicants selected under the RFP will be subject to the following administrative standards and provisions, which include, but are not limited to:

- a) Workforce Investment Boards – 20 Code of Federal Regulations (CFR) Part 667.220 (Administrative Costs).
- b) Non-Profit Organizations – Office of Management and Budget (OMB Circulars A-122 (Cost Principles) and 29 CFR Part 95 (Administrative Requirements).
- c) Educational Institutions – OMB Circulars A-21 (Cost Principles) and 29 CFR Part 95 (Administrative Requirements).
- d) State and Local Governments – OMB circulars A-87 (Cost Principles) and 29 CFR Part 97 (Administrative Requirements).
- e) All entities must comply with 29 CFR Parts 93 and 98, and where applicable, 29 CFR Parts 96 and 99.
- f) In accordance with Section 18 of the Lobbying Disclosure Act of 1995, Public Law 104-65 (2 U.S.C. 1611) non-profit entities incorporated under Internal Revenue Code Section 501(c) (4) that engage in lobbying activities will not be eligible for the receipt of Federal funds and grants.
- g) 29 CFR part 2, subpart D--Equal Treatment in Department of Labor Programs for Religious Organizations; Protection of Religious Liberty of Department of Labor Social Service Providers and Beneficiaries.
- h) 29 CFR part 30--Equal Employment Opportunity in Apprenticeship and Training.
- i) 29 CFR part 31--Nondiscrimination in Federally Assisted Programs of the Department of Labor--Effectuation of Title VI of the Civil Rights Act of 1964.
- j) 29 CFR part 32--Nondiscrimination on the Basis of Handicap in Programs and Activities Receiving or Benefiting from Federal Financial Assistance.
- k) 29 CFR part 33--Enforcement of Nondiscrimination on the Basis of Handicap in Programs or Activities Conducted by the Department of Labor.
- l) 29 CFR part 35--Nondiscrimination on the Basis of Age in Programs or Activities Receiving Federal Financial Assistance from the Department of Labor.
- m) 29 CFR part 36--Nondiscrimination on the Basis of Sex in Education Programs or Activities Receiving Federal Financial Assistance.
- n) 29 CFR part 37--Implementation of the Nondiscrimination and Equal Opportunity Provisions of the Workforce Investment Act of 1998 (WIA).
- o) Regional Integration Policy, DWD Policy 2007-20
- p) Indiana Code IC ~~22-4.5-7~~, Regional Workforce System

In addition, an individual having Contract Signature Authority must sign the Assurance and Certification Document (Attachment D). **Note:** Do not re-type this document; use the copy provided in the RFP.

2. Inquiry/Protest Procedures

Bidders who desire a debriefing must submit a written request within ten (10) business days of the receipt of the Board's notification of the procurement decision. In the debriefing, the bidder will obtain information on the procurement process and how their proposal or offer was reviewed and ranked.

If after the debriefing, the appealing party wishes to continue with the appeal process, they must submit to the Board, a written Notice of Appeal within ten (10) business days of the date of the appealing party's debriefing. Inquiries shall be directed to:

Indiana Region 5 Workforce Board, Inc. Fiscal Agent
c/o Doug Jones
3815 River Crossing Parkway, Suite 300
Post Office Box 40977
Indianapolis, IN 46240-0977

The appeal must indicate the specific grounds and the violation, which forms the basis for the appeal, and shall be signed by the appellant organization's authorized representative. Fax and e-mail transmittals will not be accepted. The filing of the appeal within the time frame is a condition precedent. Hearings shall be conducted in accordance with Board procedures.

3. Authorized Board Contact

The authorized Board contact person for this procurement is:

Indiana Region 5 Workforce Board, Inc. Fiscal Agent c/o Doug Jones 3815 River Crossing Parkway, Suite 300 Post Office Box 40977 Indianapolis, IN 46240-0977 doug.jones@crowehorwath.com Fax: (317) 706-2660

Please address all questions pertaining to this RFP, in writing, to the Authorized Board Contact. Questions will not be accepted after 4:00 PM EST Friday, February 27, 2009. The official Board response to all questions pertaining to this RFP will be in writing and made available to all potential bidders. All written questions will be answered in a question and answer publication that will be e-mailed out, to potential bidders who have submitted a letter of intent, within three (3) working days after the date of receipt. Bidders are encouraged to check their e-mail daily for additional questions and answers, any changes to the RFP, or any additional information regarding the RFP.

Other than as specified above, all members of the Indiana Region 5 Workforce Board, Board staff, authorized representatives, or agents of the Board are precluded from entertaining or responding to questions concerning this RFP or the procurement process.

Potential Bidders are prohibited from making any contact related to this RFP with Board staff or the Board of Directors at any time during this procurement. Violations of this prohibition will result in the automatic disqualification of the offending Bidder.

The Indiana Region 5 Workforce Board, Inc. (RWB) reserves the right to reject any and all proposals it receives in response to this RFP. It is understood that submitted proposals will become part of RWB 5 official files without further obligation. RWB 5 will not pay for the development or preparation of proposals.

ATTACHMENTS

Attachment A**Workforce Investment Act Program Year 2008 Allocations**

Total	Adult	Youth	DW	TOTAL
State Allotments	\$18,165,758	\$20,463,638	\$23,517,230	\$62,146,626
>Administration	\$908,287	\$1,023,181	\$1,175,860	\$3,107,328
>Governor's Discretionary	\$1,816,576	\$2,046,364	\$2,351,723	\$6,214,663
>Rapid Response			\$5,879,307	\$5,879,307
>Amount to be allocated to the workforce investment boards	\$15,440,895	\$17,394,093	\$14,110,340	\$46,945,328
Workforce Investment Boards				
Marion County	\$2,872,213	\$3,083,012	\$2,038,254	\$7,993,479
Balance of State	\$12,568,682	\$14,311,081	\$12,072,086	\$38,951,849
Total	\$15,440,895	\$17,394,093	\$14,110,340	\$46,945,328
Balance of State				
Region 1	\$2,468,945	\$2,584,083	\$1,651,711	\$6,704,739
Region 2	\$1,338,346	\$1,571,635	\$1,351,142	\$4,261,123
Region 3	\$2,134,813	\$2,420,776	\$2,213,085	\$6,768,674
Region 4	\$1,050,255	\$1,436,297	\$1,195,442	\$3,681,994
Region 5	\$993,651	\$992,274	\$1,783,941	\$3,769,866
Region 6	\$1,194,953	\$1,422,536	\$1,012,026	\$3,629,515
Region 7	\$743,034	\$841,873	\$417,315	\$2,002,222
Region 8	\$682,114	\$931,427	\$508,554	\$2,122,095
Region 9	\$503,386	\$486,088	\$772,037	\$1,761,511
Region 10	\$593,715	\$582,105	\$517,512	\$1,693,332
Region 11	\$865,470	\$1,041,987	\$649,321	\$2,556,778
Balance of State Total	\$12,568,682	\$14,311,081	\$12,072,086	\$38,951,849

Attachment A.1**Region 5 2008-2009 FUNDING**

Program	Program	Admin.	Total Contracts
WIA Adult	894,286	-	894,286
WIA Dislocated Worker	1,605,547	-	1,605,547
WIA Youth	893,047	-	893,047
WIA Admin	-	376,986	376,986
Disaster Relief (NEG)	125,625	7,500	133,125
Rapid Response-Plastech	22,500	2,500	25,000
Rapid Response-ATA	500,000	50,000	550,000
Business Consultant	39,200	800	40,000
Navigator	45,535	3,200	48,735
Rapid Response Tier II	181,531	51,060.58	232,591.58
SSI Healthcare	74,838.73	17,242.21	92,080.94
SSI Tech Scholarships	44,455.08	15,687.58	60,142.66
Adult carry-in	5,259.98	-	5,259.98
D.W. carry-in	226,531.69	-	226,531.69
Youth carry-in	43,500.54	-	43,500.54
Admin carry-in	-	4,434.31	4,434.31
Totals	\$4,701,857.02	\$529,410.68	\$5,231,267.70

Attachment B

APPLICATION COVER SHEET

Organization's Legal Name:

Contact person:

Address:

Telephone:

E-mail:

Federal ID #:

Signature Date Authorized

Print Name: _____

Title: _____

Attachment C

Non-Collusion Affidavit

State of Indiana

County of _____

The respondent is hereby giving oath that it has not, in any way, directly or indirectly, entered into any arrangement or agreement with any other respondent or with any officer or employee of the Indiana Region 5 Workforce Board, Inc. whereby it has paid or will pay to such other respondent or officer or employee any sum of money or anything of real value whatever; and has not, directly or indirectly, entered into any arrangement or agreement with any other respondent or respondents which tends to or does lessen or destroy free competition in the letting of the agreement sought for by the attached response; that no inducement of any form or character other than that which appears on the face of the response will be suggested, offered, paid, or delivered to any person whomsoever to influence the acceptance of the said response or awarding of the agreement, nor has this respondent any agreement or understanding of any kind whatsoever, with any person whomsoever, to pay, deliver to, or share with any other person in any way or manner any of the proceeds of the agreement sought by this response.

Signature of Authorized Representative

Print of Type Name

Subscribed and sworn to me this day ____ of _____

Notary Public

County of _____

Commission Expiration Date _____

Attachment D

ASSURANCES AND CERTIFICATIONS

Workforce Investment Act (WIA) recipients are obligated to maintain the following assurance for the period during which WIA Title I financial assistance is extended as stated in 29 CFR 37.21. Each request for proposal, proposal and application for financial assistance under WIA Title I shall contain the following assurances as required by 29 CFR 37.20.

“As a condition to the award of financial assistance from the Department of Labor under Title I of WIA, the recipient assures that it will comply fully with the nondiscrimination and equal opportunity provisions of the following laws:

Section 188 of the WIA, which prohibits discrimination against all individuals in the United States on the basis of race, color, religion, sex, national origin, age, disability, political affiliation or belief, and against beneficiaries on the basis of either citizenship/status as a lawfully admitted immigrant authorized to work in the United States or participation in any WIA Title I-financially assisted program or activity; Title VI of the Civil Rights Act of 1964, as amended, which prohibits discrimination on the bases of race, color or national origin; Section 504 of the Rehabilitation Act of 1973, as amended, which prohibits discrimination against individuals with disabilities; the Age Discrimination Act of 1975, as amended, which prohibits discrimination on the bases of age; and Title IX of the Education Amendments of 1972, as amended, which prohibits discrimination on the basis of sex in educational programs.”

The recipient also assures that it will comply with 29 CFR Part 37 and all other regulations implementing the laws listed above. This assurance applies to the recipients operation of the WIA Title I-financially assisted program or activity, and to all agreements the recipient makes to carry out the WIA Title I-financially assisted program or activity. The recipient understands that the United States has the right to seek judicial enforcement of this assurance.

Debarment, Suspension, and Other Responsibility Matters: This certification is required by the Federal Regulations, implementing Executive Order 12549, Government-wide Debarment and Suspension, for the Department of Agriculture (7 CFR Part 3017), Department of Labor (29 CFR Part 98), Department of Education (34 CFR Parts 85), Department of Health and Human Services (45 CFR Part 76).

The undersigned applicant certifies that neither it nor its principals:

- (1) Are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency;
- (2) Have not within a three-year period preceding this application been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or Local) transaction or contract under a public transaction, violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
- (3) Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity with commission of any of the offenses enumerated in Paragraph (2) of this section; and

- (4) Have not within a three-year period preceding this application had one or more public transactions terminated for cause or default.

Nondiscrimination: The undersigned applicant certifies that it shall comply with the nondiscrimination provisions outlined in the WIA of 1998 including Title I, Sec. 184 (f) and Sec. 188 (a); 20 CFR 667.266 (a) and 45 CFR 80 and 84.

Conflict of Interest: The undersigned applicant certifies that:

- (1) No manager, employee or paid consultant of the Proposer is a member of the Board of Directors, or an employee of the Board;
- (2) No manager or paid consultant of the Proposer is married to a member of the Board of Directors, or an employee of the Board;
- (3) No member of the Board of Directors, or an employee of the Board owns or has any control in the Proposer's organization;
- (4) No spouse of a member of the Board of Directors, or employee of the Board receives compensation from Proposer for lobbying activities;
- (5) Proposer has disclosed within the proposal response any interest, fact or circumstance which does or may present a potential conflict of interest;
- (6) Should Proposer fail to abide by the foregoing covenants and affirmations regarding conflict of interest, Proposer shall not be entitled to the recovery of any costs or expenses incurred in relations to any contract with the Board and shall immediately refund the Board any fees or expenses that may have been paid under the contract and shall further be liable for any other costs incurred or damages sustained by the Board relating to that contract.

Lobbying: This certification is required by the Federal Regulations, Implementing Section 1352 of the Program Fraud and Civil Remedies Act, Title 31 U.S. Code for the Department of Agriculture (7 CFR Part 3018), Department of Labor (29 CFR Part 93), Department of Education (34 CFR Part 82), Department of Health and Human Services (45 CFR Part 93).

The undersigned applicant certifies that:

- (1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence any officer or employee of Congress, or an employee of a Member of Congress, or locally elected officials.
- (2) In connection with the awarding of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan or cooperative agreement.
- (3) If any funds, other than Federal appropriated funds, have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, any officer or employee of Congress, an employee of a Member of Congress, or locally elected officials in connection with this Federal contract, grant, loan or cooperative agreement,

the undersigned shall complete and submit "Disclosure Form to Report Lobbying", in accordance with its instructions.

- (4) The undersigned shall require that the language of this certification be included in the award for all sub-awards at all tiers (including subcontracts, sub-grants, and contracts under grants, loans, and cooperative agreements) and that all sub-recipients shall certify and provide disclosure accordingly.

Drug-Free Workplace: This certification is required by the Federal Regulations, Implementing Section 5150-5160 of the Drug-Free Workplace Act, 41 U.S.C. 701; for the Department of Agriculture (7 CFR Part 3017), Department of Labor (29 CFR Part 98), Department of Education (34 CFR Part 85, 668 and 682), Department of Health and Human Services (45 CFR Part 76).

The undersigned applicant certifies that it shall provide a drug-free workplace by:

- (a) Publishing a policy statement notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the workplace and specifying the consequences of any such action by an employee;
- (b) Establishing an ongoing drug-free awareness program to inform employees of the dangers of drug abuse in the workplace, the Contractor's policy of maintaining a drug-free workplace, the availability of counseling, rehabilitation and employee assistance programs, and the penalties that may be imposed on employees for drug abuse violations in the workplace;
- (c) Providing each employee with a copy of the Contractor's policy statement;
- (d) Notifying the employees in the Contractor's policy statement that as a condition of employment under this contract, employees shall abide by the terms of the policy statement and notifying the Contractor in writing within five (5) days after any conviction for a violation by the employee of a criminal drug statute in the workplace;
- (e) Notifying the Commission within ten (10) days of Contractor's receipt of a notice of a conviction of an employee; and,
- (f) Taking appropriate personnel action against an employee of violating a criminal drug statute or require such employee to participate in drug abuse assistance or a rehabilitation program.

These certifications are material representations of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction.

WIA Sec. 184 (f): Discrimination Against Participants: -- If the Secretary determines that any recipient under WIA Title I has discharged or in any other manner discriminated against a participant or against any individual in connection with the administration of the program involved, or against any individual because such individual has filed any complaint or instituted or caused to be instituted any proceeding under or related to WIA Title I, or has testified or is about to testify in any such proceeding or investigation under or related to WIA Title I, or otherwise unlawfully denied to any individual a benefit to which that individual is entitled under the provision of WIA Title I or the Secretary's regulations, the Secretary shall, within 30 days, take such action or order such corrective measures, as necessary, with respect to the recipient or the aggrieved individual, or both.

WIA Sec. 188 (a):

- (1) Federal financial assistance.** -- For the purpose of applying the prohibitions against discrimination on the basis of age under the Age Discrimination Act of 1975 (42 U.S.C. 6101 et seq.), on the basis of disability under section 504 of the Rehabilitation Act of 1973 (29 U.S.C. 794), on the basis of sex under Title IX of the Education Amendments of 1972 (20 U.S.C. 1681 et seq.), or on the basis of race, color, or national origin under Title VI of the Civil Rights Act of 1964 (42 U.S.C. 2000d et seq.), programs and activities funded or otherwise financially assisted in whole or in part under this Act are considered to be programs and activities receiving Federal financial assistance.
- (2) Prohibition of discrimination regarding participation, benefits, and employment.** -- No individual shall be excluded from participation in, denied the benefits of, subjected to discrimination under, or denied employment in the administration of or in connection with, any such program or activity because of race, color, religion, sex (except as otherwise permitted under Title IX of the Education Amendments of 1972), national origin, age, disability, or political affiliation or belief.
- (3) Prohibition on assistance for facilities for sectarian instruction or religious worship.** -- Participants shall not be employed under WIA Title I to carry out the construction, operation, or maintenance of any part of any facility that is used or to be used for sectarian instruction or as a place for religious worship (except with respect to the maintenance of a facility that is not primarily or inherently devoted to sectarian instruction or religious worship, in a case in which the organization operating the facility is part of a program or activity providing service to participants).
- (4) Prohibition on discrimination on basis of participant status.** -- No person may discriminate against an individual who is a participant in a program or activity that receives funds under WIA Title I, with respect to the terms and conditions affecting, or rights provided to, the individual, solely because of the status of the individual as a participant.
- (5) Prohibition on discrimination against certain non-citizens.** -- Participation in programs and activities or receiving funds under WIA Title I shall be available to citizens and nationals of the United States, lawfully admitted permanent resident aliens, refugees, asylees, and parolees, and other immigrants authorized by the Attorney General to work in the United States.

20 CFR §667.266 (a): WIA Title I funds may not be spent on the employment or training of participants in sectarian activities.

Further, the undersigned applicant certifies that it shall comply with the provisions outlined by the U.S. Department of Health and Human Services (45 CFR 80 and 84).

With regard to Section 504 of the Rehabilitation Act of 1973 (29 U.S.C. 794), the provider agrees to comply with the implementing regulations that require that each program of training services, when funded in all or in part with federal funds, shall be accessible to qualified individuals with disabilities. The provider further agrees to meet all applicable requirements regarding facility access.

By signing, the applicant certifies that it will comply with all other regulations implementing the laws cited above. This assurance applies to the applicant's operation of the WIA Title I - financially assisted program or activity, and to all agreements, the applicant makes to carry out the WIA Title I-financially assisted program or activity. The applicant understands that the United States, Indiana Department of Workforce Development, and the Board have the right to seek judicial enforcement of this assurance. NOTE: WIA non-discrimination regulations are published at 29 CFR 37.

Documentation of Financial Stability: The undersigned applicant certifies that it shall comply with the Indiana Department of Workforce Development with regard to providing documentation of financial stability. As part of their local application requirements, the Board is to specify its local protocol for documentation and submission requirements.

Reporting Requirements: The undersigned applicant certifies that it shall comply with the provisions of Sec. 122 of the Workforce Investment Act of 1998 and the reporting and procedural requirements issued by the Indiana Department of Workforce Development.

Where the prospective recipient of federal assistance funds is unable to certify to any of the statements in this certification, such prospective recipient shall attach an explanation to this certification.

The undersigned Authorized Representative of the applicant herein certifies that the statements above pertaining to Debarment, Suspension and Other Responsibility Matters; Nondiscrimination; Conflict of Interest; Education Standards and Procedures; Documentation of Financial Stability and Reporting Requirements are true and correct as of the date of submission. This does not preclude the Board from requiring additional assurances as part of the local application requirements.

Further, the Authorized Representative acknowledges that if the information given to the Board by the applicant causes harm to a third party, then applicant will be held liable for any Board action resulting from reliance on that information.

The applicant must notify the Board in writing if the authorized signatory changes.

Certified by:

Signature of Authorized Official

Typed/Printed Name of Signatory

Signatory's Official Title

Proposer's Name

Date: / / (mm/dd/yyyy)

Attachment E**BUDGET ESTIMATE WORKSHEET**

Line Item	Total Budget
Salaries	
Fringe Benefits	
Staff Development and Travel	
Operating Expenses:	
Rent	
Utilities	
Maintenance	
Furniture and Other Equipment	
Office Supplies	
Contract	
Overhead	
TOTAL	

Budget Narrative Criteria

The budget narrative must include:

1. List each person or position proposed, the hourly rate of pay or annual salary for each person (or position) assigned to this contract (or proposed to be hired) and the estimated percentage of each individual's time that he or she will perform work for the contract.
2. Indicate the number of hours or days of vacation, sick leave that each staff person is or will be permitted. Describe any other benefits to be provided to the RO staff. Indicate the benefit percentage and what benefits are included for staff.
3. How you arrived at the staff development and travel estimate, including purpose for travel (national conferences, seminars, statewide meetings, local meetings, staff development). For staff development, include what memberships and subscriptions are anticipated.
4. Operating expenses, your best estimate of rent, utilities, maintenance, furniture and other equipment and office supplies.

5. If there are contracts that the Regional Operator intends to procure rather than provide through its own staff (e.g., development of State of the Workforce Reports, retreat facilitation, special studies, information technology, etc.), please describe. If applying as an organization with a subcontractor, fully explain what functions are being subcontracted and how the cost was determined. For the subcontractor, include all the information required of the lead organization in the budget narrative. Do not include cost of client services (service provider, training, client supportive services, etc).
6. Breakdown your overhead estimates. Reasonable overhead includes costs for accounting, audit, legal, and organizational costs.